Cisco webex

WebEx Integration to Outlook

User Guide

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cisco

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1

Introducing WebEx Integration to Outlook

About WebEx Integration to Outlook

WebEx Integration to Outlook provides a convenient way for you to schedule or start online meetings using Microsoft Outlook. Using Integration to Outlook, you can perform these activities without the need to use your WebEx service Web site—that is, the site on which you normally schedule and join your online meetings.

WebEx Integration to Outlook is a WebEx Productivity Tool for Microsoft Outlook. WebEx Productivity Tools are automatically installed on your computer when you log in to your WebEx service Web site, and are automatically updated when new versions are available. You can also install Productivity Tools manually.

Once WebEx Productivity Tools are installed, WebEx integration options appear in Microsoft Outlook, allowing you to quickly schedule an online meeting.

Note: Before you use WebEx Integration to Outlook, ensure that:

- You have a user account on your WebEx service Web site.
- The Integration to Outlook option for WebEx Productivity Tools is available on your WebEx service Web site.
- Your computer is connected to the Internet.
- You are familiar with Microsoft Outlook.

When scheduling a meeting, you can invite attendees using any of your Outlook address lists, including the Global Address List, Personal Address List, or Contacts folder. Attendees whom you invite to a meeting do not need to use Integration to Outlook to join the meeting.

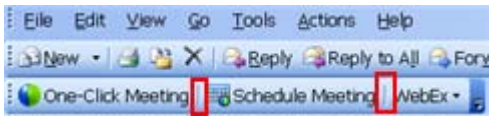
To provide security for your meetings, Integration to Outlook uses 128-bit SSL (Secure Sockets Layer) encryption for all data it sends to and retrieves from your WebEx service Web site.

WebEx Integration to Outlook also provides the following:

- quick access to My WebEx on your WebEx service Web site, which includes your personal list of meetings, user profile, and other account options
- a feature for starting a One-Click instant meeting (not available for all WebEx service sites)
- templates for meeting invitations

About the Integration to Outlook options

After the WebEx Productivity Tools are installed, the WebEx integration toolbar appears in the Microsoft Outlook window:



Click and drag one of these lines to "float out" the WebEx toolbar, as you can with the Microsoft Outlook toolbars.

Clicking the X button closes the floating toolbar. To regain the toolbar, right-click any Microsoft Outlook toolbar, and then choose WebEx Productivity Tools.

The following table describes the WebEx Integration toolbar buttons.

Button	Description
One-Click Meeting	Starts a One-Click meeting. A One-Click meeting is an instant meeting that you can start at any time, without having to schedule the meeting in advance. For details, refer to the *One-Click User's Guide* on your WebEx service Web site. You can specify options for instant meetings on the Instant Meetings tab of the WebEx Settings dialog box.
Schedule Meeting	Clicking this button opens the Outlook Appointment window, which contains Integration to Outlook options for scheduling an online meeting. You can specify options for scheduled meetings on the **Scheduled Meetings** tab of the WebEx Settings dialog box. F **Note:** the Meeting window in Outlook also contains the WebEx integration options.
WebEx Settings	▪ Clicking this button opens a menu that provides the following options: ▪ **My WebEx**—Lets you access My WebEx, in which you can manage your account information and the meetings that you scheduled, on your WebEx service Web site. For details about My WebEx, refer to the online Help on your site. ▪ **Account Settings**—Opens the **Account** tab of the WebEx Settings dialog box and lets you specify your WebEx user account information—that is, the URL of your WebEx service Web site and your username and password. You can also specify additional options in the WebEx Settings dialog box, such as options for instant meetings and scheduled meetings. ▪ **Meeting Templates**—Lets you view templates that you or your site administrator saved on your WebEx service Web site. The templates contain meeting settings. You can select the template that meets your needs. Meeting templates are available only if site administration settings allow hosts to use templates for Outlook. ▪ **Set Scheduling Permission**—Opens the My WebEx Profile page on which you can assign a delegate to schedule or edit meetings on your behalf. ▪ **Help**—Lets you look up instructions for using WebEx Integration to Outlook. ▪ **About**—Lets you view the version number and license and patent information about WebEx Integration to Outlook.

2

Scheduling a Meeting

About scheduling a meeting

To schedule an online meeting using WebEx Integration to Outlook and to send meeting invitations, be aware of the following:

- Integration to Outlook provides basic options for scheduling a meeting. Some options that appear on your WebEx service Web site are not available in Integration to Outlook.
- Integration to Outlook does not support all of the recurrence options that are available in Microsoft Outlook.
- In any meeting invitations that you send from Microsoft Outlook, the meeting's starting time appears in the time zone that is set on your computer, not in your site preferences for your WebEx service.

  On your WebEx service Web site, all meeting times appear in the time zone that you set in your site preferences, regardless of the time zone that is set on your computer.

Setting up a meeting and inviting attendees

Setting up a meeting

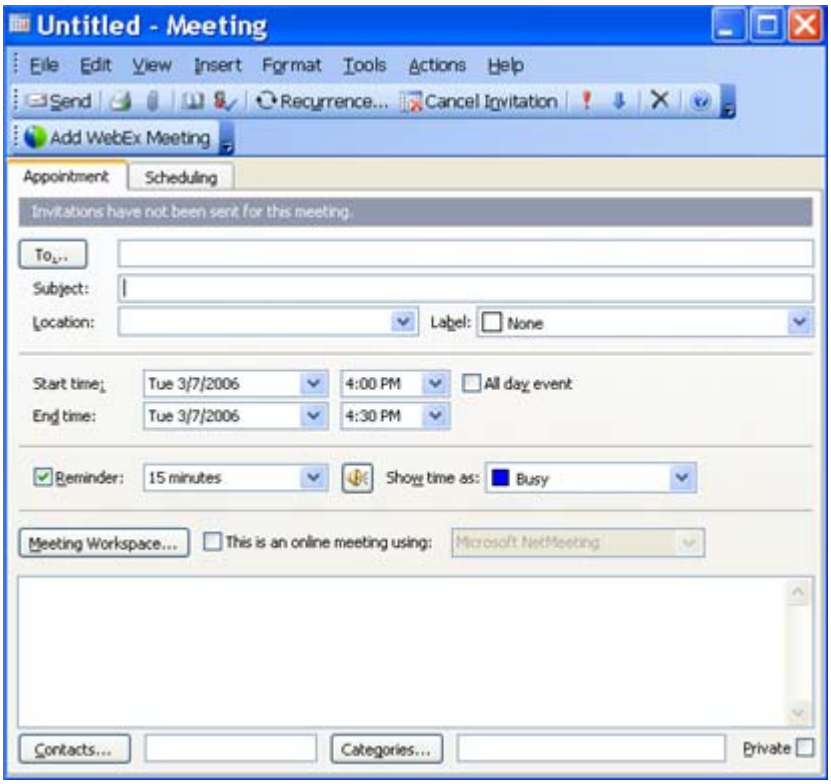
To set up an online meeting using WebEx Integration to Outlook, open a new Meeting Request or Appointment window in Outlook, and then specify information and settings for the meeting.

To set up a meeting using Integration to Outlook:

1 Do *either* of the following in Microsoft Outlook:

- Click **Schedule Meeting** on the WebEx toolbar.
- On the **File** menu, choose **New** > **Meeting Request** or **New** > **Appointment**.

A scheduling window appears with the **Add WebEx Meeting** button.



2 Do the following to specify general meeting information:

- Type a topic for the meeting in the **Subject** box.
- In the **Start time** and **End time** drop-down lists, specify the starting and ending times for the meeting, respectively.
- Optional. To specify a recurrence pattern for your meeting, click **Recurrence**, and then select recurrence options.

- Optional. Specify other options that Microsoft Outlook provides, such as a meeting reminder.

3. Click **Add WebEx Meeting** to specify meeting settings.
4. If the **Account** tab of the WebEx Settings dialog box appears, type the necessary information, and then click **OK**.

   The WebEx Settings dialog box appears. If you are scheduling the meeting for another host, a message, "You're scheduling for [host name]," indicates that in the WebEx Settings dialog box.
5. Specify WebEx meeting settings, and then click **OK**.
6. Do *one* of the following, as appropriate:
   - Send a meeting invitation to attendees.
   - Click **Save and Close**, and invite attendees to the scheduled meeting at a later time.

Integration to Outlook contacts your WebEx service Web site, and then adds the scheduled meeting to:

- your Outlook calendar
- the list of meetings on the My WebEx Meetings page on your WebEx service Web site
- your Personal Meeting Room page, if your account includes one

Inviting attendees

When using WebEx Integration to Outlook to schedule a meeting, you can invite attendees by selecting their names or email addresses in any of your Microsoft Outlook contacts lists. For example, if your organization maintains a Global Address List, you can invite attendees by selecting their names in that list. You can also invite attendees who are not in an Outlook contacts list by entering their email addresses.

Once you invite an attendee to a scheduled meeting, he or she receives an invitation email message. The email message includes information about the meeting—including its password—and a link that the attendee can click to join the meeting.

To send meeting invitation:

1. If you have scheduled a meeting using WebEx Integration to Outlook, open the meeting item in your Outlook calendar.

   If you opened an Appointment window, click **Invite Attendees** to see the **To** box. The following figures show an example.

After you click Invite Attendees, the To box appears, in which you can enter attendees' names or email addresses

To remove the To box, in which you can enter attendees' names or email addresses and invite them, click Cancel Invitation.

2 Enter attendees' names or email addresses in the **To** box, and then click **Send**.

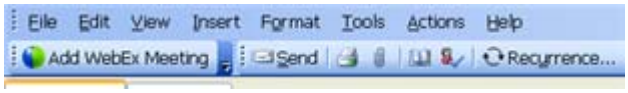
Specifying a recurrence pattern for a meeting

Using Microsoft Outlook recurrence options, you can specify a recurrence pattern for your online meeting. For example, you can specify that a meeting recurs at 2 p.m. every Wednesday until a specific date. WebEx Integration to Outlook schedules the meeting on each day that you specify in the recurrence pattern.

The recurrence options that you can use with WebEx Integration to Outlook are limited to the options that are available on your WebEx service Web site. Depending on your WebEx service, the use of a recurrence pattern may not be supported. To learn which recurrence patterns that Integration to Outlook does not support, see Recurrence patterns that Integration to Outlook does not support.

To specify a recurrence pattern for an online meeting:

1 In the Meeting or Appointment window for the meeting, click **Recurrence**.



Click Recurrence to set a recurrence pattern for your meeting.

2 Specify the options in the dialog box, and then click **OK**.

Recurrence pattern support in WebEx Integration to Outlook

The following table shows how Outlook recurrence patterns are handled in WebEx:

WebEx Meetings

Type	Outlook Option	Converted to WebEx Meeting Option
Daily	Every [X] days	Every [X] days
	Every weekday	Every weekday
Weekly	Every [x] weeks on: [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday]	*For Meeting Center and Sales Center meetings:* Every [x] weeks on: [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] *For Event Center events and Training Center training sessions:* Every week on: [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] If you schedule a meeting that repeats every X week, where X is greater than 1, in Microsoft Outlook, the meeting will be scheduled in Outlook as you specified, but will appear as a weekly meeting on your WebEx service site.
Monthly	Day [x] of every [y] months	Day [x] of every [y] months
	The [first, second, third, fourth, last] day of every month	Day [1,2,3,4,31] of every month
	The [first, second, third, fourth, last] weekday or weekend day	Not supported
	The [first, second, third, fourth, last] Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] of every [x] months	The [first, second, third, fourth, last] Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] of every [x] months
Yearly	Every [January....December] [1,....31]	Every [January....December] [1,....31]
	[first, second, third, fourth, last] [day, weekday, weekend day] of [January....December]	Not supported.

Type	Outlook Option	Converted to WebEx Meeting Option
	[first, second, third, fourth, last] [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] of [January....December]	[first, second, third, fourth, last] [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] of [January....December]
End date	No end date.	No end date.
	End after [x] occurrences.	End after [x] occurrences.
	End by [date input]	End by [date input]

Note: If you use Integration to Outlook to modify meeting settings for a recurring meeting, you must apply the changes to the entire series of the meeting. For example, if you apply the changes to just a single occurrence of the meeting, the changes will show only in Outlook, not on your WebEx service Web site.

Assigning a delegate to schedule meetings for you

WebEx Integration to Outlook allows you to assign a delegate to schedule or edit meetings on your behalf.

For example, if you need to host WebEx meetings on a regular basis, you can give your assistant permission to schedule meetings for you.

After being given permission, your delegate can schedule, edit, cancel, and start meetings for you.

To assign a delegate to schedule meetings for you, do both of the following:

- On your WebEx service Web site, give the delegate scheduling permission.
- In Microsoft Outlook, select the delegate and share your calendar with him or her.

Important:

- A meeting that your delegate scheduled will appear in your calendar. If you want to edit it, you must have WebEx Integration to Outlook 3.1 or a later version installed on your computer.
- At any time, you can remove scheduling permission from your delegate.
- This feature is not available on the Cisco WebEx Meeting Center Pay Per Use site.

Assigning a delegate on your WebEx service Web site

To assign a delegate, you give him or her scheduling permission on the My WebEx > My Profile page on your WebEx service site. You can go to the page directly from Microsoft Outlook.

If you want to go to the My WebEx Profile page without using Microsoft Outlook, you can log in to your WebEx service Web site, and then click **My WebEx** > **My Profile**.

Besides giving scheduling permission on your WebEx service Web site, you must also share your calendar with the delegate in Microsoft Outlook.

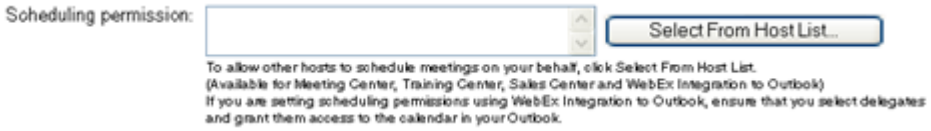
Important:

- If you do not see the option to assign a delegate on your WebEx service Web site, ensure that your site administrator turns on the feature.
- Your delegate must also have a WebEx host account on your WebEx service Web site.
- The email addresses for both your and the delegates' accounts on your WebEx service Web site must match those in Microsoft Outlook.

To assign a delegate on your WebEx service Web site:

1. In Microsoft Outlook, click **WebEx**.
2. On the menu that appears, choose **Set Scheduling Permission**.

   The My WebEx Profile page appears.
3. Click **Select From Host List**.In the Scheduling Permission area, select an available host's name, and then click the left-pointing arrow.


Scheduling permission:
Select From Host List...
To allow other hosts to schedule meetings on your behalf, click Select From Host List.
(Available for Meeting Center, Training Center, Sales Center and WebEx Integration to Outlook)
If you are setting scheduling permissions using WebEx Integration to Outlook, ensure that you select delegates and grant them access to the calendar in your Outlook.

4. In the Select Hosts window that appears, select the email address of the delegate, and then click **Add** > **OK**.
5. Click **Update**.

Assigning a delegate in Microsoft Outlook

To assign a delegate, you share your calendar with him or her in Microsoft Outlook.

Besides sharing your calendar in Microsoft Outlook, you must also give scheduling permission on your WebEx service Web site.

Important:

- Ensure that the calendar you share does not reside in your personal folder in Microsoft Outlook. Your delegate can access your calendar only if it resides in a public folder.
- The name of the delegate you want to assign must be in the Global Address List in your Microsoft Outlook.

To assign a delegate in Microsoft Outlook:

1. On the **Tools** menu, choose **Options**.
2. On the **Delegates** tab, click **Add**.
3. Select the delegate's name, and then click **OK**.
4. In the Delegate Permissions dialog box, select **Editor** in the **Calendar** drop-down list, and then click **OK**.

5. Click **Apply** > **OK**.

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Scheduling for Another Host

About scheduling a meeting for another host

Delegates only

You can schedule a meeting on behalf of another host if the host gave you the permission to do so.

For example, if you are an administrative assistant to a director who needs to host WebEx meetings on a regular basis, the director can assign you to schedule meetings on his or her behalf.

With scheduling permission given by another host, you can schedule, edit, and cancel meetings for that host.

Before you schedule a meeting for another host, ensure that:

- You have a WebEx host account. To obtain a WebEx host account, contact your site administrator.
- The WebEx Integration to Outlook add-in program is installed in your Microsoft Outlook.
- The actual host does the following:
  - gives you scheduling permission on the WebEx service Web site.
  - selects you as a delegate in Microsoft Outlook and shares his or her calendar with you.

Note:

- After scheduling a meeting on behalf of another host, you can also start the meeting for that host, if necessary.
- At any time, the actual host can remove scheduling permission from you.

- This feature is not available on the Cisco WebEx Meeting Center Pay Per Use site.

Scheduling a meeting or an appointment for another host

Delegates only

To schedule a meeting or an appointment for another host, first open the host's Microsoft Outlook calendar, which the host already shared with you.

To schedule a meeting or an appointment for another host:

1. Open the other host's calendar in Microsoft Outlook by doing the following:
   a) On the **File** menu, choose **Open** > **Other User's Folder**.

      The Open Other User's Folder dialog box appears.

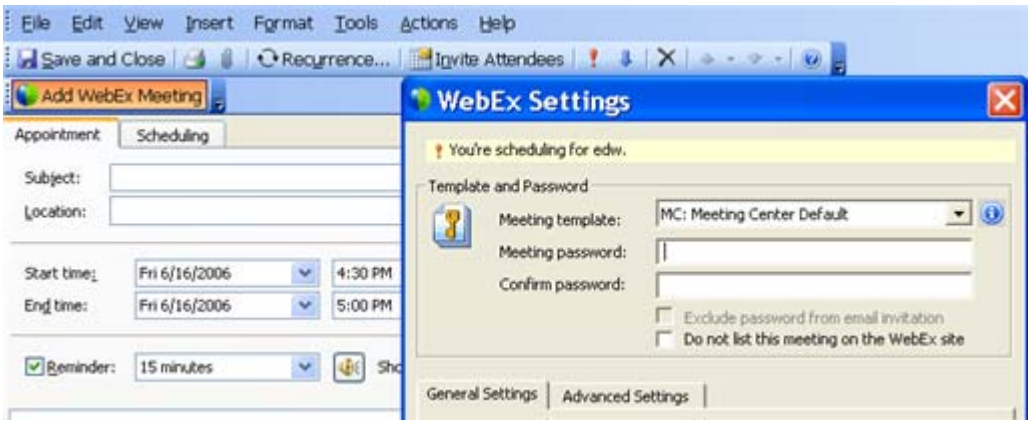
   b) Type the name of the actual host or click **Name** to select the actual host's name.
   c) Select **Calendar** in the **Folder type** drop-down list, and then click **OK**.

      The shared calendar appears.

      Note: There are multiple ways of opening another person's calendar, depending on how you customize your views in Microsoft Outlook. For details, see the Microsoft Outlook Help.

2. If you are viewing multiple calendars side by side, ensure that you select the actual host's calendar by clicking it once.
3. Open a new Meeting Request or Appointment window in Outlook, and then specify information and settings for the meeting.

If you are scheduling the meeting for another host, a message indicates that in the WebEx Settings dialog box .



You can also edit or cancel the meeting you scheduled.

Starting a meeting for another host

Once you schedule a meeting for another host, the actual host receives a confirmation email message in his or her Microsoft Outlook. First ensure that the actual host still shares his or her calendar with you in Microsoft Outlook. Then you can start the meeting from the host's calendar.

To start a meeting for another host:

1. Open the other host's calendar in Microsoft Outlook by doing the following:

   a) In Microsoft Outlook, on the **File** menu, choose **Open** > **Other User's Folder**.

   The Open Other User's Folder dialog box appears.

   b) Type the name of the host or click **Name** to select the host's name.

   c) Select **Calendar** in the **Folder type** drop-down list, and then click **OK**.

   The shared calendar appears.

Note: There are multiple ways of opening another person's calendar, depending on how you customize your views in Microsoft Outlook. For details, see the Microsoft Outlook Help.

2 Double-click the meeting item in the other host's calendar.

The confirmation email message appears.

3 To start the meeting, follow the instructions in the email message, and ensure that you log in to your own WebEx host account on the WebEx service Web site.

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Editing and Canceling Scheduled Meetings

Editing a scheduled meeting

Once you schedule a meeting using WebEx Integration to Outlook, you can use Outlook to edit it at any time. For example, you can change its starting time, specify a new password, choose a teleconferencing option, and so on.

Once you edit a scheduled meeting, Integration to Outlook sends an updated meeting invitation to any attendees whom you invited to the meeting and also updates the meeting information on your WebEx service Web site.

To edit a scheduled meeting:

1. On your Microsoft Outlook calendar, open the item for the scheduled meeting.
2. Edit meeting information or change options on either the toolbar or on the Appointment tab.

   For example:

   - To change the WebEx meeting settings, click **Change Settings**.
   - To remove the WebEx meeting settings previously set, click **Cancel WebEx Meeting**.
   - To add or change a recurrence pattern, click **Recurrence**.
   - To edit the text in the meeting invitation email message, do it on the **Appointment** tab.
3. Do *one* of the following, as appropriate:

- To send the updated meeting invitation to invited attendees and save the updated meeting in your Outlook calendar, click **Send Update**.
- To save the updated meeting to your Outlook calendar, click **Save and Close.**

Integration to Outlook contacts your WebEx service Web site and updates the meeting on the site.

Important:

- If you edit a WebEx meeting using your WebEx service Web site, your changes will not show in Microsoft Outlook. For example, if you change the meeting's starting time using your site, the starting time does not change on your Outlook calendar. Therefore, WebEx meeting service recommends that you use only Outlook to edit a meeting.
- If you reschedule or cancel a single occurrence of a recurring WebEx meeting using Microsoft Outlook, the changes will show only in Outlook, not on your WebEx service Web site. For example, if you change the starting time of a single occurrence of a recurring WebEx meeting in Outlook, attendees can still join the meeting at the old starting time. Therefore, if you want to modify a recurring meeting using Outlook, WebEx meeting service recommends that you apply the changes to the entire series of the meeting.

Canceling a meeting

You can cancel a meeting in Microsoft Outlook. When canceling a meeting, you can also send a cancellation notice to all attendees whom you invited to the meeting.

WebEx Integration to Outlook also contacts your WebEx service Web site and cancels, or removes, the meeting from your site. A message appears, confirming that your meeting was removed.

To cancel a scheduled meeting:

1. In Microsoft Outlook, do *any* of the following:
   - Open the meeting item. On the toolbar, click

   - Open the meeting item. On the **File** menu, choose **Delete**.
   - Select the meeting item in the calendar. Right-click, and then choose **Delete**.
2. Choose whether to notify invited attendees or not, and then click **OK**.

Microsoft Office Outlook
The attendees have not been notified that this meeting "Staff Meeting" has been canceled. Choose one of the following:
Send cancellation and delete meeting.
Delete without sending a cancellation.
OK
Cancel

3 Click **OK** in the confirmation box.

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Starting a Meeting

About starting a meeting

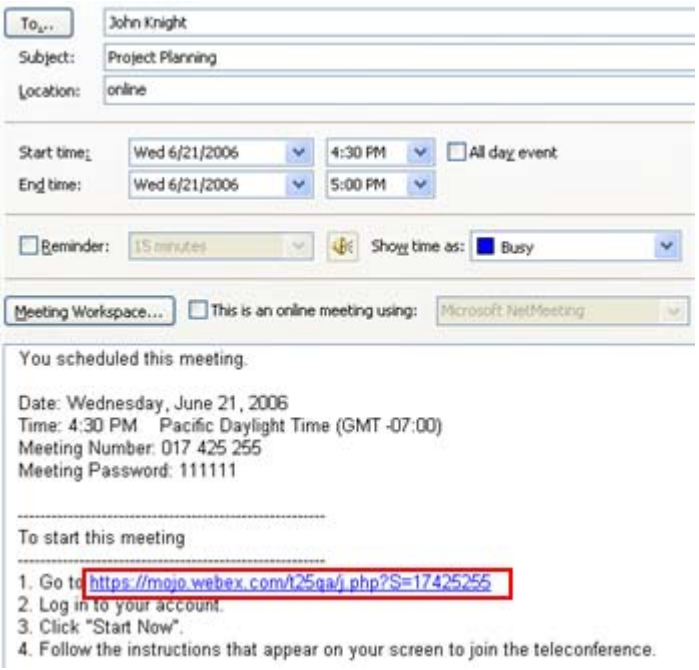
After you schedule a meeting using WebEx Integration to Outlook, you can start the meeting from your Microsoft Outlook or your WebEx service Web site.

Starting a scheduled meeting from Microsoft Outlook

To start a meeting from an Outlook meeting item:

In your Microsoft Outlook calendar, open the meeting item, and then click the link to start the meeting.

The following figure shows an example of a meeting item.



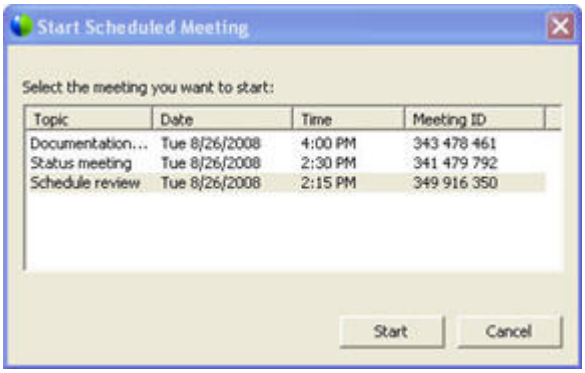
Click this link to start your meeting.

Important: The link that appears in your meeting item is for meeting hosts only. The link that appears in attendees' invitations is a different link, which attendees can click to join the meeting. For more information, see Joining a meeting from the invitation email.

To start a scheduled meeting from the WebEx menu in Outlook:

1. In Microsoft Outlook, click **WebEx**.
2. On the menu that appears, choose **Start a Scheduled Meeting**.

   The Start Scheduled Meeting dialog box appears and displays a list of meetings you have previously scheduled.



3. Select the meeting you want to start.

4 Click **Start**.

Your meeting starts and the Meeting Manager window opens.

Starting a meeting from your WebEx service site

To start a meeting from your WebEx service site:

1 In Microsoft Outlook, click **WebEx**.

2 On the menu that appears, choose **My WebEx**.

The My WebEx Meetings page appears.

Note: You may be asked to log in to your WebEx service site if you are not already logged in.

3 Make sure **The meetings you host** is selected in the list at the top of the page.

4 Click **Start** next to the meeting you want to start.

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Joining a Meeting

About joining a meeting

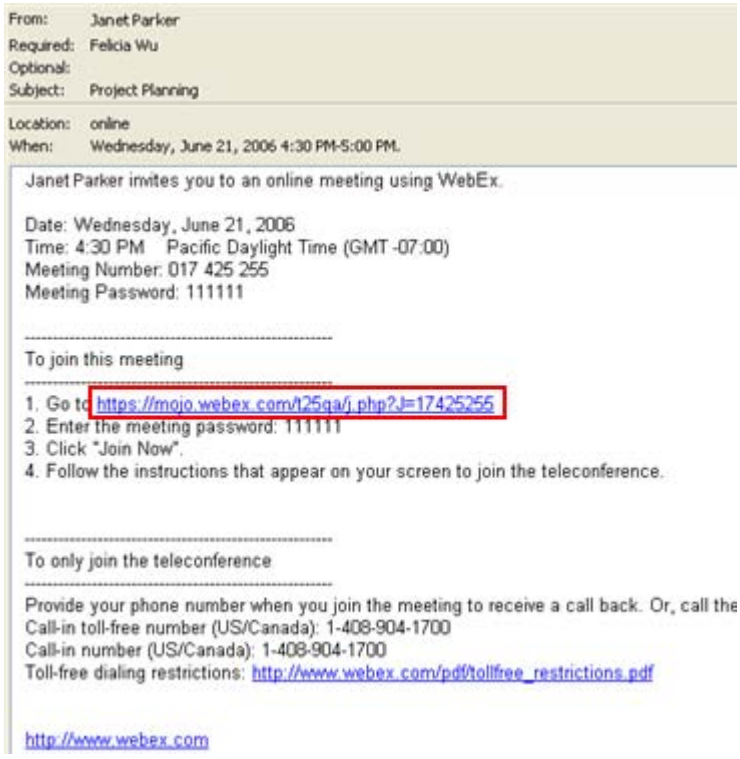
If you use WebEx Integration to Outlook to schedule a meeting and invite attendees to the meeting, they receive an invitation email message that includes a link that they can click to join the meeting.

Meeting attendees can also join a meeting from your WebEx service Web site.

Joining a meeting from the invitation email

In attendees' email programs, they open the invitation email message that they received, and then click the appropriate link in the message to join the meeting.

The invitation email message or registration confirmation email message that attendees receive contain the necessary information they need to join the meeting, such as the meeting number, meeting password, or registration ID.


From: Janet Parker
Required: Felicia Wu
Optional:
Subject: Project Planning
Location: online
When: Wednesday, June 21, 2006 4:30 PM-5:00 PM.
Janet Parker invites you to an online meeting using WebEx.
Date: Wednesday, June 21, 2006
Time: 4:30 PM Pacific Daylight Time (GMT -07:00)
Meeting Number: 017 425 255
Meeting Password: 111111
To join this meeting
1. Go to https://mojo.webex.com/t25qa/j.php?J=17425255
2. Enter the meeting password: 111111
3. Click "Join Now".
4. Follow the instructions that appear on your screen to join the teleconference.
To only join the teleconference
Provide your phone number when you join the meeting to receive a call back. Or, call the
Call-in toll-free number (US/Canada): 1-408-904-1700
Call-in number (US/Canada): 1-408-904-1700
Toll-free dialing restrictions: http://www.webex.com/pdf/tollfree_restrictions.pdf
http://www.webex.com

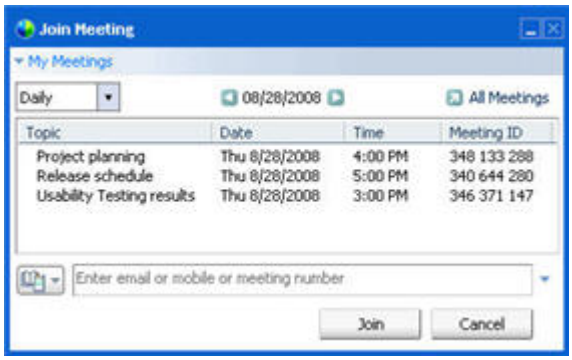
Click this link to join the meeting.

Joining a meeting from the WebEx menu in Outlook

To start a scheduled meeting from the WebEx menu in Outlook:

1. In Microsoft Outlook, click **WebEx**.
2. On the menu that appears, choose **Join a Meeting**.

   The Join Meeting dialog box opens and shows a list of meetings you are invited to for the current day.



3. (Optional) Select a different date to show the meetings for that date, or select **Weekly** or **Monthly** to show the meetings for that week or month.
4. (Optional) If you want to view all the meetings you are invited to, click **All Meetings** to see the complete list of meetings on your WebEx service site.
5. In the box below the list of meetings, enter your email address, mobile phone number, or the meeting number.
6. Click **Join**.

Joining a meeting from the WebEx service Web site

You can join a meeting you are invited to on your WebEx service Web site.

You may need the following information to join a meeting:

- meeting password
- registration ID—For the Event Center service only. If the event host requires attendees to provide registration IDs before they join the event, they receive a unique ID in their registration confirmation email message.
- meeting number—Attendees must provide this to join an *unlisted* meeting—that is, a meeting that is not displayed on the calendar on your WebEx service Web site.

To join a meeting you are invited to on your WebEx service site:

1. In Microsoft Outlook, click **WebEx**.
2. On the menu that appears, choose **My WebEx**.

   The My WebEx Meetings page appears.

Note: You may be asked to log in to your WebEx service site if you are not already logged in.

3. Make sure **The meetings you are invited to** is selected in the list at the top of the page.
4. Click **Join** next to the meeting you want to join.

7

Installing and Setting Up WebEx Productivity Tools

You can install WebEx Productivity Tools to start or join meetings instantly using One-Click, Microsoft Office, Web browsers, Microsoft Outlook, IBM Lotus Notes, and instant messengers; or to schedule meetings using Microsoft Outlook or IBM Lotus Notes, without going to your WebEx service site.

After you install WebEx Productivity Tools, you can log in and set options for your WebEx account, set meeting options for instant meetings and scheduled meetings, set preferences for the One-Click panel, and select which Productivity Tools you will use with WebEx.

The following list describes features for installing and setting up options for WebEx Productivity Tools:

- Install WebEx Productivity Tools
- Open the WebEx Settings dialog box
- Set options for WebEx Productivity Tools
- Uninstall WebEx Productivity Tools

Opening the WebEx Settings dialog box

To open the WebEx Settings dialog box from the Start menu:

Click **Start > Programs > WebEx > Productivity Tools > WebEx Settings**.

The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from the One-Click Panel:

1. If the One-Click Panel is not already open, do one of the following:

- Double-click the WebEx One-Click icon on your desktop.

- Go to **Start > Programs > WebEx > Productivity Tools > WebEx > One-Click**.

2 In the One-Click Panel, click **Edit WebEx Settings**.

The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from the One-Click taskbar icon:

1 Right-click the One-Click taskbar icon.

2 Choose **WebEx Settings** from the menu.

The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from Microsoft Outlook or IBM Lotus Notes:

In the WebEx menu, click **Account Settings**.

The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from Microsoft Office:

In Microsoft Word, Microsoft Excel, or Microsoft PowerPoint, click **WebEx Settings**.

The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from instant messengers:

Click **WebEx > WebEx Settings**.

The WebEx Settings dialog box appears.

Installing WebEx Productivity Tools

If your site administrator has turned on WebEx Productivity Tools options for your WebEx service site, all WebEx Productivity Tools are installed automatically on your site. In addition, whenever newer versions are available, WebEx Productivity Tools are updated automatically.

The installation process installs all available WebEx Productivity Tools; however, at any time, you can change your preferences about which applications to use with WebEx Productivity Tools, and you can also change other WebEx account and meeting preferences by setting options in the WebEx Settings dialog box.

If necessary, you can also download and install WebEx Productivity Tools manually. Before installing WebEx Productivity Tools, ensure that your computer meets the following minimum system requirements:

- Microsoft Windows 2000, XP, 2003, Vista
- Microsoft Internet Explorer 6.0 SP1 or 7.0, or Firefox 3.0 or later
- Intel x86 (Pentium 400MHZ +) or compatible processor
- JavaScript and cookies enabled in the browser

Note: The WebEx integration for IBM Lotus Notes is included in the WebEx Productivity Tools installation or download only if your site administrator has turned on the Lotus Notes option for the site.

To install WebEx Productivity Tools from the Productivity Tools Setup page:

1. Log in to your WebEx service Web site.
2. Click **My WebEx > Productivity Tools Setup** (on the left navigation bar).

   The Productivity Tools Setup page appears.
3. Under **On Your Desktop**, click **Download Productivity Tools**.

   The File Download dialog box appears.
4. Save the installation program to your computer.

   The name of the installation file has an **.msi** extension.
5. Run the installation file and follow the instructions.

   Once you complete installation, log in using your WebEx account information and then verify your settings in the WebEx Settings dialog box.

To install WebEx Productivity Tools from the Downloads page:

1. Log in to your WebEx service Web site.
2. In the left navigation bar, under Support, click **Downloads**.
3. In the Downloads page, next to the WebEx Productivity Tools heading, click **Download Now**.

   The File Download dialog box appears.
4. Save the installation program to your computer.

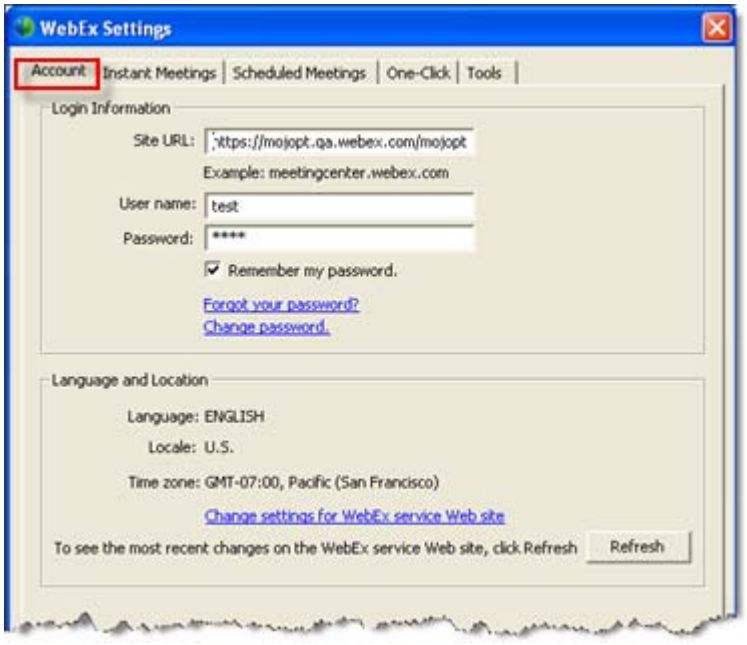
   The name of the installation file has an **.msi** extension.
5. Run the installation file and follow the instructions.

   Once you complete installation, you can log in with your WebEx account information and then verify your settings in the WebEx Settings dialog box.

Setting Up WebEx Productivity Tools

To set WebEx Productivity Tool options:

1. Open the WebEx Settings dialog box.



2. In the **Account** tab, log in to your account by specifying the URL for your WebEx service site and entering your username and password.

3 Click **Apply**.

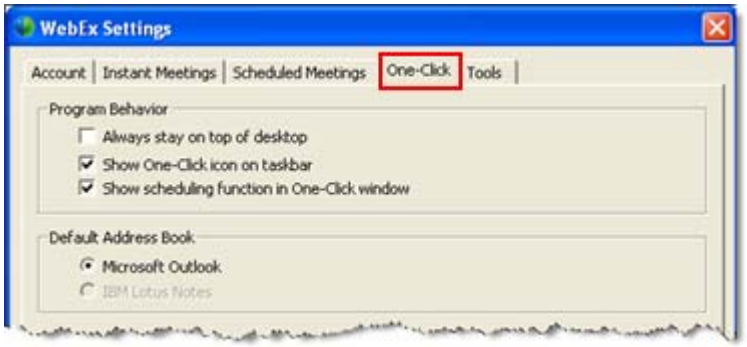
4 Click the **Instant Meetings** tab.

5 Specify options for meetings started instantly from the One-Click panel, Microsoft Office, browsers, instant messengers, right-click menus, and from Microsoft Outlook or IBM Lotus Notes.

6 Click the **Scheduled Meetings** tab.

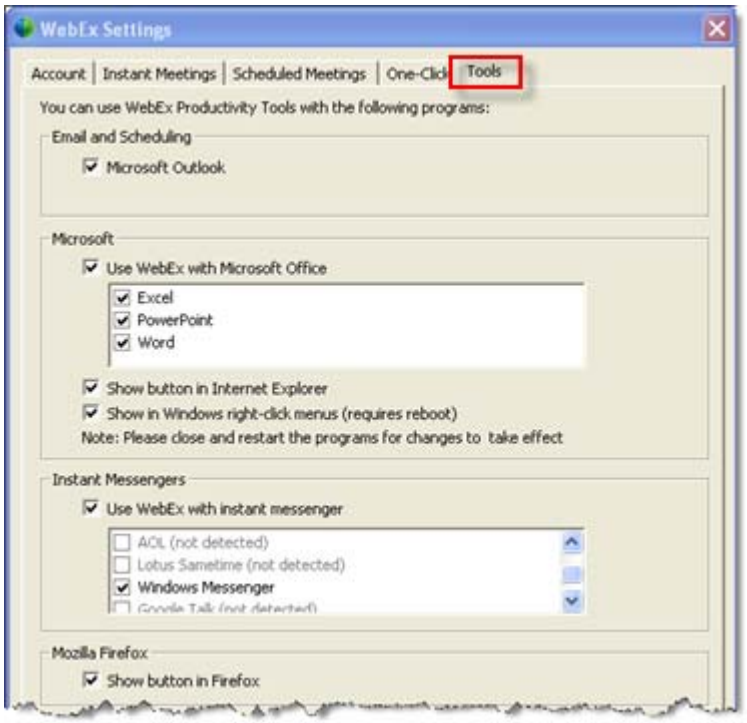
7 Specify options for meetings scheduled from Microsoft Outlook or IBM Lotus Notes.

8 Click the **One-Click** tab.



9 Specify options for the One-Click panel.

10 Click the **Tools** tab.



Select which applications to use WebEx integrations with.

About the WebEx Settings dialog box

How to access this dialog box

To access the WebEx Settings dialog box from the Start menu:

Click **Start > Programs > WebEx > Productivity Tools >WebEx Settings**.

The WebEx Settings dialog box appears.

To access the WebEx Settings dialog box from the One-Click Panel:

1. If the One-Click Panel is not already open, do one of the following:
   - Double-click the WebEx One-Click icon on your desktop.

- Go to **Start > Programs > WebEx > Productivity Tools > WebEx > One-Click**.

2 In the One-Click Panel, click **Edit WebEx Settings**.

The WebEx Settings dialog box appears.

To access the WebEx Settings dialog box from the One-Click taskbar icon:

1 Right-click the One-Click taskbar icon.

2 Choose **WebEx Settings** from the menu.

The WebEx Settings dialog box appears.

To access the WebEx Settings dialog box from Microsoft Outlook or IBM Lotus Notes:

In the WebEx menu, click **Account Settings**.

The WebEx Settings dialog box appears.

To access the WebEx Settings dialog box from Microsoft Office:

In Microsoft Word, Microsoft Excel, or Microsoft PowerPoint, click **WebEx Settings**.

The WebEx Settings dialog box appears.

To access the WebEx Settings dialog box from Instant Messengers:

Click **WebEx >WebEx Settings**.

The WebEx Settings dialog box appears.

Tabs in this dialog box

The WebEx Settings dialog box contains the following tabs:

- Account
- Instant Meeting
- Scheduled Meeting
- One-Click
- Tools

About the Account tab

Account options allow you to log in to your WebEx service site with your user name and password.

Use this option...	To...
Site URL	Enter the URL to the WebEx service site from which the Productivity Tools were installed.
User name	Enter the user name for a host account on your WebEx service site.
Password	Enter the password for the host account on your WebEx service site.
Remember my password	Store the user name and password you entered so that you do not need to enter your user name and site URL next time you log in.
Forgot your password	Open the Login Assistance page on the WebEx service site, which sends you a reminder of your password.
Change password	Open a dialog box that allows you to specify a new password.
Language	Verify the language that is currently selected for your WebEx service site.
Locale	Verify the country or locale that is currently selected for your WebEx service site.
Time zone	Verify the time zone that is currently selected for your WebEx service site.
Change settings for WebEx service site	Open the **My WebEx > My Profile** page on your WebEx service site, and make changes to your profile.
Refresh	Refresh the WebEx Settings dialog box with the most recent settings from the WebEx service site.

About the Instant Meetings tab

Instant meeting options s affect meetings started instantly from the One-Click panel, Microsoft Office, browsers, instant messengers, right-click menus, and from Microsoft Outlook or IBM Lotus Notes.

Use this option…	To…
Service type	Select the type of WebEx session for which you want to start a meeting.

Use this option…	To…
	This option lists only the session types available for your site and user account.
Meeting topic	Enter the topic or name for the meeting.
Meeting password	Require participants to enter the password you set to join your meeting. Your site may require that all passwords comply with security criteria, such as a minimum length and a minimum number of letters, numbers or special characters.
List this meeting on the WebEx site	Include this meeting on the meeting calendars on the WebEx service site. Available for meetings, sales meetings, and training sessions only.
List Support Session on Personal Meeting Room	Includes this support session in your meetings list on your Personal Meeting Room on the WebEx service site. Available for support sessions only.
Ask for my approval when someone joins	Specify that the Request to Join dialog box appears on your screen when someone tries to join your meeting. Available for support sessions only.

Use this option…	To…
Conference type	Select the type of teleconference you would like to use: ▪ **None** ▪ **InterCall Reservationless-Plus** ▪ **Other teleconference**

Use this option…	To…
Tracking code	Identify your department, project, or other information that your organization wants to associate with your meetings. Tracking codes can be optional or required, depending on how your site administrator set them up. If your site administrator requires you to select a code from a predefined list, select a code from the appropriate drop-down list.
CUVC Meeting ID	(CUVC Integration to Meeting Center only) Enter a custom URL to create a virtual meeting room in which you can use Cisco Unified Video (CUVC) in your meeting. If you leave this box empty, the WebEx Meeting ID is used by default. When you start your WebEx meeting, the CUVC Video panel displays automatically.

About the Scheduled Meetings tab

Scheduled meeting options affect meetings scheduled from Microsoft Office or IBM Lotus Notes.

Use this option…	To...
Service type	Select the type of WebEx meeting you would like to schedule. The list includes the meeting types that are available for your service website. The **Other Teleconference** option allows you to schedule your meeting with another teleconference service.
Meeting topic	Enter the topic or name for the meeting.
Meeting password	Require participants to enter the password you set to join your meeting. Your site may require that all passwords comply with security criteria, such as a minimum length and a minimum number of letters, numbers or special characters.
Exclude password from email invitation	Exclude the meeting password from the email message that is sent to everyone who is invited to your meeting.
List this meeting on the WebEx site	Include this meeting in the meeting calendars on the WebEx service site. Available for meetings, sales meetings, events, and training sessions only.
Attendees can join the	Allow attendees to join the meeting within a set number of minutes

Use this option…	To...
meeting [x] minutes before starting time	before the meeting's starting time. **Note** If you clear this check box or set this option to 0 minutes, you must start the meeting before attendees can join it.
CUVC Meeting ID	(CUVC Integration to Meeting Center only) Enter a custom URL to create a virtual meeting room in which you can use Cisco Unified Video (CUVC) in your meeting. If you leave this box empty, the WebEx Meeting ID is used by default. When you start your WebEx meeting, the CUVC Video panel displays automatically.

Audio & Tracking tab

Options that affect audio conferences and tracking.

Use this option…	To…
Conference type	Select the type of teleconference you would like to use: ▪ **None** ▪ **Intercall Reservationless Plus** ▪ **Other teleconference**
Tracking code	Identify your department, project, or other information that your organization wants to associate with your meetings. Tracking codes can be optional or required, depending on how your site administrator set them up. If your site administrator requires you to select a code from a predefined list, select a code from the appropriate drop-down list.

Registration tab

Options that affect how attendee registrations are approved.

Use this option…	To…
Require attendee registration	Specify that all attendees must register to attend the meeting so you can accept or deny entry into your meeting. An attendee cannot attend

Use this option…	To…
	the meeting until you accept his or her registration request. This option is available only if the **Attendees can join the meeting [x] minutes before starting time** option is cleared.
Automatically accept all registration	Accept all registration requests automatically. If this option is not selected, you must accept registration requests manually by using the options on the Registered Attendees page on the WebEx service site. This option is available only if the **Attendees can join the meeting [x] minutes before starting time** option is cleared and the **Require attendee registration** option is selected.

Resources tab

Options that control how resources are used in meetings.

Use this option…	To…
Info tab templates	Choose a template for the **Info** tab, which appears in the content viewer during the meeting. The **Info** tab contains information about the meeting, including the meeting host, teleconference phone numbers, and host key (for the host only). **Note:** You can choose another template only if one or more customized **Info** tab templates are available for your meeting service. Your site administrator can add templates for your service.
Automatically play the presentation before the host joins	Automatically play a presentation that attendees can view before the host actually joins the meeting.

About the One-Click tab

One-Click options affect the features of the One-Click panel.

Use this option…	To…
Always stay on top of desktop	Have the WebEx One-Click panel appear on top of every application or program that is open on your computer.
Show One-Click icon on taskbar	Show the One-Click icon in the taskbar.
Show scheduling	Show the links **Start Scheduled Meeting** and **Schedule Meeting** on

Use this option…	To…
function in One-Click window	the panel. Clicking either of the links takes you to the appropriate pages on your WebEx service site.
Microsoft Outlook or **IBM Lotus Notes**	Select an email and scheduling program for a default address book. WebEx One-Click integrates with the email program you select, making it easy for you to obtain your contacts' email addresses. Clicking on the WebEx One-Click panel opens an address book from the email program you select here.

About the Tools tab

Tools options determine which programs include WebEx integrations and shortcuts.

Use this option...	To...
Microsoft Outlook	Show WebEx buttons and commands for scheduling meetings or starting One-Click meetings with Microsoft Outlook using the contacts and calendar from Microsoft Outlook.
IBM Lotus Notes	Show WebEx buttons and commands for scheduling meetings or starting One-Click meetings with IBM Lotus Notes using the contacts and calendar from Outlook.
Use WebEx with Microsoft Office	Show WebEx buttons for starting a One-Click meeting and automatically sharing a selected file or document from the following Microsoft Office applications: ▪ Excel ▪ PowerPoint ▪ Word
Show button in Internet Explorer	Show a WebEx button that allows you to start One-Click meetings from the Microsoft Internet Explorer toolbar.
Show in Windows right-click menus (requires reboot)	Show a WebEx command that allows you to start a One-Click meeting and automatically share a selected file or document from the right-click shortcut windows available in Windows Explorer.
Use WebEx with instant messenger	Shows WebEx buttons and commands that allow you to start a One-Click meeting from an instant messenger. You can select one or more of the following instant messengers: ▪ AOL ▪ Google Talk ▪ Lotus Sametime

Use this option...	To...
	▪ Skype ▪ Windows Messenger ▪ Yahoo Messenger
Show button in Firefox	Shows a WebEx button that allows you to start instant meetings from the Firefox toolbar.

Uninstalling WebEx Productivity Tools

You can uninstall WebEx Productivity Tools at any time.

To uninstall WebEx Productivity Tools by using Start menu commands:

1. Click **Start** > **Programs> WebEx > Productivity Tools > Uninstall**
2. Click **Yes** to confirm that you want to uninstall WebEx Productivity Tools.

To uninstall WebEx Productivity Tools by using the Control Panel:

1. Click **Start > Settings > Control Panel**.
2. Double-click **Add/Remove Programs**.
3. Click **WebEx Productivity Tools**.
4. Click **Remove**.
5. Click **Yes** to confirm that you want to uninstall WebEx Productivity Tools.

Note: Uninstalling Productivity Tools removes all Productivity Tools and shortcuts from your computer. If you want to keep using some Productivity Tools but disable others, edit the options in the WebEx Settings dialog box.